

Notes from Population NMEC Working Group, Meeting 4

Wednesday, June 12, 2019

Facilitator: Katie Wu

Note-taker: Caroline Massad Francis, PG&E

- Katie Wu welcomed participants and reviewed the agenda.
- Coby Rudolph thanked participants for contributing to the process, including Michelle Vigen Ralston of Common Spark Consulting, who is not at this meeting because she had her baby last week. He discussed next steps (see slide 3 in attached deck)
 - Common Spark drafted a report (shared with this group via email on Tuesday 6/11) that documents the WG process and recommendations that resulted from June 4 in-person meeting.
 - **FOLLOW UP ITEM: Participants are asked to provide corrections by NO LATER THAN EOD Tuesday 6/18.** Email Katie Wu: wu.katie.c@gmail.com. Feel free to red-line language.
 - The report will be revised and made public, posted on the NMEC working group webpage.
 - The report will serve as a resource to the CPUC as it drafts population-level NMEC rules. Parties to the proceeding will have the opportunity to comment formally on those rules before they are made final.
 - Stakeholders in this WG that are not currently parties but would like to comment on the rules may wish to motion for party status to do so.
 - In contrast to the formal comment process for the rules themselves, the WG process has been informal.
 - The end of this phase of the WG does not imply that discussion of rules for NMEC is ending.
- Katie Wu reviewed the process the WG has followed (see slides 4-7)
 - Meeting 1 (May 6) introduced a straw definition of population-level NMEC and encouraged participants to pose questions for consideration in response to a survey
 - Meeting 2 (May 15) comprised additional discussion of the definition of population-level NMEC and determined three areas for developing guidance. Small groups developed straw proposals in writing and held calls May 29-30.
 - Definition/population eligibility
 - Modeling guidance
 - Process and roles for determining savings
 - Meeting 3 (in person, June 4): Issues in the three priority areas were discussed/recommendations were refined.
 - Common Spark's report summarizes the recommendations discussed in the June 4 meeting, and the WG process.
- Katie Wu reviewed the recommendations were in the following areas (see draft report or slides 9-14 for details). The group discussed recommendations in a few of these areas; those discussions are captured below.
 - Bucket: Definition of population-level NMEC
 - *Defining population NMEC* (details on slide 9)

- No detailed discussion
- *Aggregate population eligibility* (slide 10)
 - Stef Wayland, ODC: noted that the limitation on not using hourly data to calculate FSU is specific to the ASHRAE FSU formula, suggested point 3 should not be absolute
 - Faith DeBolt, SBW: Given that comment, should #1 specify anything about the ASHRAE FSU formula?
 - David Jump, kW engineering (via chat): ASHRAE's FSU formula was defined in ASHRAE Guideline 14 - 2002. If you apply the ASHRAE FSU formula with hourly data, you'll underestimate uncertainty. ASHRAE has new formulations of uncertainty in GL14-2014, they are the same if you compare with the old. I think they dropped the FSU name.
 - Caroline Massad Francis, PG&E: noted that there is a footnote re: different FSU formulas in the full report draft (see item 1 under this recommendation), those with detailed knowledge of this topic may wish to review that note and suggest clarifications or revisions
- Modeling
 - *Modeling/methodology transparency and access* (slide 11)
 - Faith DeBolt, SBW: does the phrase "Methodology may be public or open-source" mean that methods must be public/open source (and not proprietary/black box), or is there no requirement? Language is not clear. If open source or public methods are preferred, should be stated; if they are not, perhaps remove
 - Henry Burton, PAO: suggested that we change the sentence in question to read "should be public or open source...and must at least be available for..."
 - Stef Wayland, ODC: expressed an opinion that for methods to be public and open source is useful, but not related to the task at hand of checking/validating methods. Open source methods may be used and tested more, but may not necessarily be higher quality.
 - Adam Stein, Gridium: expressed an opinion that there should not be a requirement for methods to be public or open source, as a method can be tested even if it is proprietary, and the emphasis should be on models' efficacy and high-quality testing procedures. "Ideally" in the last sentence makes it sound as though testing is not a requirement.
 - Adam Scheer, Recurve: expressed an opinion that this decision should be up to the CPUC, but in terms of ensuring ratepayer dollars are well spent there are inherent advantages with open source models.
 - Caroline Massad Francis, PG&E: reported her recollection from the conversation on June 4 that there was a weak preference for open source/public models but ability to review was emphasized as being more important, and the expectation was that availability for review was a minimum.

- Lia Webster: suggested that we need a list of what should be available for review (note-taker's note: there is one in the full report, please feel free to review)
- Henry Burton, PAO: Remove word "ideally." Also expressed preference for open source methodologies from ratepayer perspective for a reason separate from ability to test: in order to promote sharing of best practices. However, noted that he wouldn't want to exclude a strong approach because source code is not fully public.
- **Facilitator's recommendation:** group does not have a recommendation on necessity of public/open source models, but agrees that testing is important
- *M&V plan requirements and thresholds (slide 11-12)*
 - No detailed discussion
- Process and roles
 - *Forecasting, reporting and claiming savings*
 - Coby Rudolph, CPUC: noted there are parallel efforts underway within the reporting PCG and other venues. We will have to determine an appropriate venue for further discussion on this topic, CPUC is always open to feedback and ideas.
 - *Data*
 - Faith DeBolt, SBW: expressed an opinion that the sentence about data flowing from implementer forward is the right sentiment, but PAs and evaluators need to work together ensure that the data being collected during implementation will support evaluation. This necessitates coordination early on, ideally before implementation begins.
 - Adam Scheer, Recurve: pointed out that the process followed here may be different than deemed and custom, should be documented
 - *Pay-for-performance*
 - Adam Scheer, Recurve and Faith DeBolt, SBW: both asked if detail about the discussion and opinions on both sides could be included in the write-up, even though consensus did not emerge. Since discussion was robust, Adam and Faith wanted to ensure that it was captured.
 - Coby Rudolph: noted that there is additional detail included in the report, asked participants to review it.